

Lync Meeting Organizer Guidance & Best Practice



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This page is devoted to guidance and best practices for those who will be organizing digital meetings or learning sessions using the Lync Online tools.

Self Help and Quick Start Guides

- [Lync Meeting Organizers](#)
- [Lync How To](#) (for Training)

You may want to first watch the 3 short videos below:

- [Scheduling an informal meeting for a small audience](#)
- [Scheduling a meeting for a large audience](#)
- [Using Lync on your Mac](#)

Guidance & Reminders to increase participant success for Lync meeting organizers:

- Aim for **full participation** – this means participants will have functioning Web cameras, microphones, and speakers (headsets may work fine too). Web cameras are not imperative, but audio (microphone, etc.) is for full participation.
- While Lync can make getting together much easier, **care should be given to not share sensitive or confidential information**, such as Personally Identifiable Information (PII) or Protected Health Information (PHI) that might be recorded and shared or observed unintentionally.
- **Setting correct expectations** (for working with school districts). For example, people may not have the client. They will need time to get the client installed and working with their computer. They may even need help (or equipment) from their technology staff.

- **Lync verbiage** - the default language when you create or schedule an online meeting is not very helpful to new users. See the below sample for a better suggestion.
- **Set up Practice Windows** – for yourself and other participants. Fully practice and test your peripherals and shared content. Some content may display differently on attendee devices. You should give folks an opportunity to test their connections, audio and video, etc. Especially if this is their first time using Lync Online. You may do this the day before or a few hours before your first meeting.
- If you are organizing a meeting, you are **guiding and leading** new and different ways to engage people. Help people get comfortable with some of the tools and buttons (remind them to MUTE their microphones, Remind them that a digital way to "raise your hand" is through the chat IM box.
- If it is a **reoccurring meeting** (the same general people), **begin by letting all participants sound off** (with audio and video). This helps build initial comfort and build participation.
- Understand what **Mac clients** can and cannot engage in. (i.e. polling tool, recording, etc). Mac users who join a session as a guest can enter through the Lync Web App in a modern web browser.
- **Interactivity** during your meeting is good. Utilize online forms, backchannels, and other tools to encourage participants to interact with meeting conversations and content.
- **External videos** (i.e. Youtube.com videos) should not be streamed through the screen-share option. The suggestion is to send the video URLs in IM/Chat box and give participants time to go watch and meet back in the Lync Online digital meeting space upon the conclusion of the video.
- Learn all of the **multiple ways to create a digital meeting space**. Ad-hoc, impromptu meetings can be set up on-demand. They can also be scheduled. Organizers should explore scheduling through the Outlook Calendar, through <https://sched.lync.com>, by drag and dropping contacts, and by meeting via creating contact groups.
- **Lync Clients** – People can connect to Lync sessions multiple ways and on multiple devices. [Lync Web App](#), [Lync 2010 for Windows](#), [Lync 2013 for Windows](#), [Lync 2011 for Mac](#), [Lync for iOS](#) (iPhone, iPad) and [Lync for Android](#) (hyper link to see client specific help)

Lync Verbiage:

First Lync Meeting? Instructions for joining our online meeting space as a registered user or a guest.

School District Employees:

- **Step 1:** If you are a school district or KDE employee (email addresses with the user@district.kyschools.us or user@education.ky.gov format), first make sure you have Lync installed on your computer by navigating to login.microsoftonline.com and follow the instructions to install the Lync Online Client. If the install is unsuccessful, contact your local technology support staff.
- **Step 2:** Click the "Join Online Meeting URL" below.

Connecting as a Guest:

- **Step 1:** If you are a guest, you will be able to join the session in a web browser. For more help, follow [this hyperlink and review the steps](#).
- **Step 2:** Click the "Join Online Meeting URL" below.

[Join Online Meeting URL](#)

- **Chat History** is Saved, and missed messages can be emailed to you automatically if you use the Outlook desktop client. Only forward that chat history to others when you've communicated to all parties that the conversation will be used with non-meeting attendees.
- **Presence** – Own it & Observe it. Don't let it own you. Set your presence when you are working on something. Also make sure to check the presence of others before calling them or reaching out to them.
- **IM** (instant message) before video calling someone. Make sure the person you are wanting to talk with is OK to talk (don't just barge in to their space)
- **Think about your actions**, not the technology being used. (Ask yourself: would I do it/ or say it Face to Face?)
- **Live Microphone Audio** – Similar to be on a conference call, when joining a meeting, make sure to check that your microphone is on mute prior to the meeting starting. If not, private conversations in your office or classroom could be broadcast out to others who are waiting for the meeting to start.
- **Video Recording** – Notify meeting attendees when you are recording and that you plan to distribute to others.

Voice and Video Quick Reference

Set up your audio devices

If you have a microphone and speakers, you're ready to use Microsoft® Lync™ 2010 for voice calls. You can also plug in many recommended devices, such as a USB headset, or handset, and Lync 2010 will automatically configure your settings. To check your audio settings, click the **Options** button, and then click **Audio Device**.



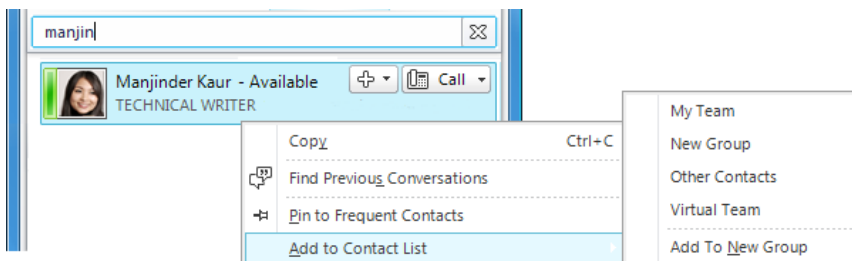
For information about the phones and devices supported by Lync, see Phones and Devices Qualified for Microsoft Lync at <http://go.microsoft.com/fwlink/?LinkId=214003>.

Plug in a webcam

When you connect a webcam to your computer, Lync automatically detects it and uses it for your next video call. To see your webcam settings, click the **Options** button, and then click **Video Device**.

Find the right person

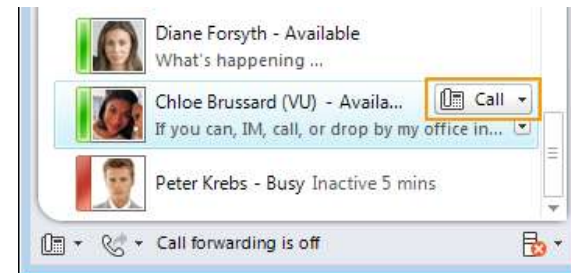
Just start typing a person's last name in the search box, and results will appear below the box. If you see who you're looking for, double-click to send an instant message. Right-click the person's name if you want to add him or her to your Contacts list.



Make a voice call

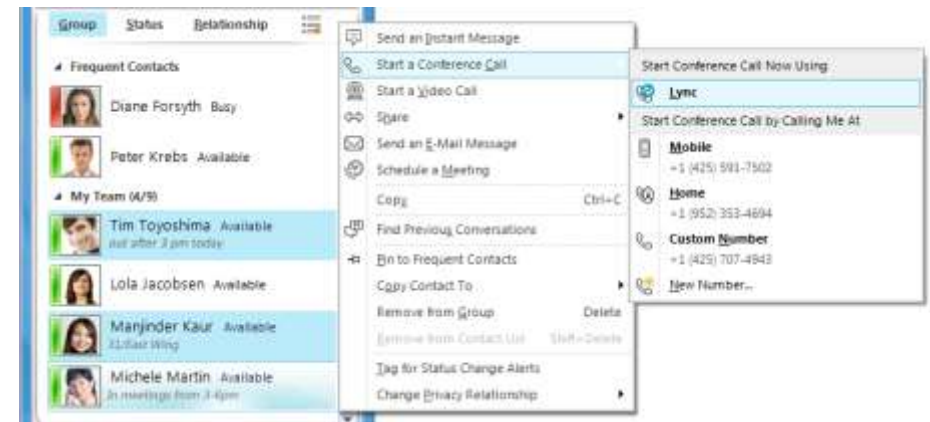
You can start a phone call with one simple click.

- 1 Point to the contact in your Contacts list.
- 2 Click the **Call** button. (Or click the arrow next to it, and then click the specific number you want. You can also add a new number.)



Start a conference call

To select multiple contacts, press and hold the Ctrl key, and click the contacts you want. Then right-click a selected contact, and click **Start a Conference Call**.



Use the call controls



To put the call on hold, click **Hold**.



To send the call to another phone or to merge the call with another conversation, click **Transfer**.



When you're finished, just click **End Call**.



To **Mute** your microphone, click the icon.

Add video

If you have a webcam set up, you can choose to allow your contact to see you during your conversation.

To add video to your IM conversation or audio call, click **Video** in the conversation window. If you accept someone's incoming video call, they won't see you until you add video from your side of the conversation.



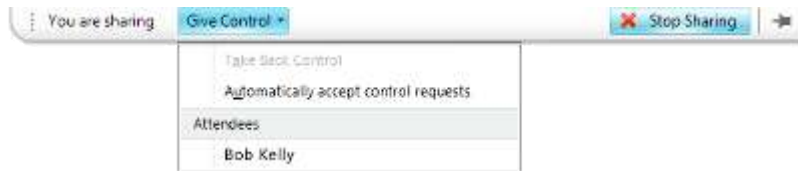
PRINT SETTINGS For best results, set printer options to: Paper Size: Letter (8.5x11"); Orientation: Landscape; 2-sided printing options: Two-sided, flip on short side.

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Give control of your desktop to others

When you start sharing your desktop or a program, you're the only one in control. When you're ready, you can allow others to use their own mouse and keyboard to navigate and make changes on your computer.

- 1 On the sharing bar at the top of the screen, click **Give Control**.



- 2 Click **Automatically accept control requests**, or click the name of an individual under **Attendees**.

Take back control

- 1 To take back control of your desktop, monitor, or program:
- 2 Click **Give Control**. If **Automatically accept control requests** is selected, click it to clear it. To take back control from an individual, click **Take Back Control**.

Know if you're sharing or presenting

Whenever you're actively sharing or presenting, a bar is shown at the top of the window that reads **You are sharing**.



Stop sharing

To end a sharing session or presentation, click **Stop Sharing**.



Sharing and Collaboration Quick Reference

During a Microsoft® Lync™ 2010 meeting or instant messaging (IM) conversation, you can share your desktop or a program, give Microsoft® PowerPoint® presentations, or collaborate on a virtual whiteboard.

Share your desktop

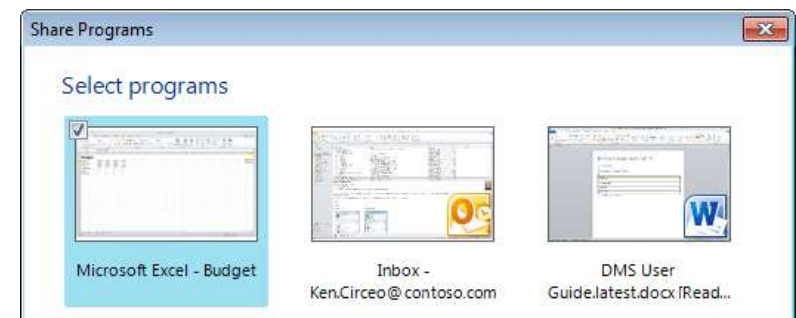
- 1 Open Lync 2010, and, in your Contacts list, double-click a contact.
- 2 When the conversation window opens, click **Share**.



- 3 If you have more than one monitor, click the one you want to share.

Share a program

- 1 In the conversation window, click **Share**, and then click **Program**.
- 2 In the **Share Programs** dialog box, click the program you want to share, and then click **Share**.



Share a PowerPoint presentation

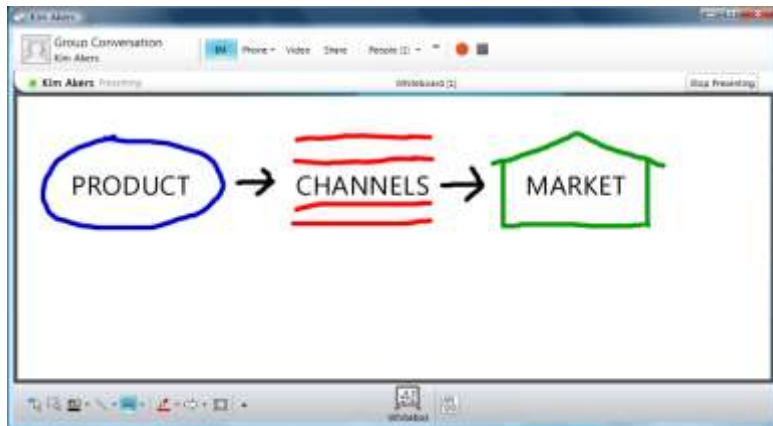
To give a presentation during a Lync meeting or IM conversation:

- 1 In the conversation window, click the **Share** menu, and then click **PowerPoint Presentation**.
- 2 In the **Share PowerPoint** dialog box, double-click the PowerPoint presentation that you want to share. When the content is prepared for presentation and uploaded, the other participants will be able to see your presentation. You can make annotations on the presentation using the annotation tools at the lower left of the presentation.

Create a whiteboard

The whiteboard is a fresh page for notes and drawings that everyone in the meeting can use together.

- 1 In the conversation window, click the **Share** menu, and then click **New Whiteboard**.
- 2 To start writing or drawing on the whiteboard, use the annotation tools at the lower left of the whiteboard.



Transfer a file

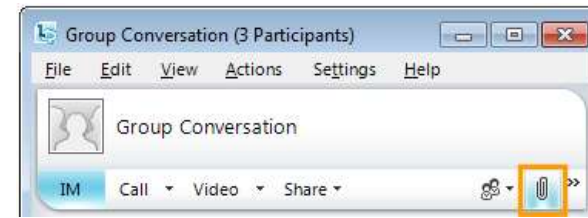
- From a Windows folder, drag the file that you want to send, and drop it into a conversation window or onto a contact in your Contacts list.

When you drop the file, a file transfer invitation is sent to the recipient. You will receive notification when the transfer is complete or declined.

Attach a file to a meeting

You can share a file with multiple people in a group conversation, meeting, or conference call, but you don't send it in the same way that you transfer a file to an individual contact. Instead, you add attachments to the meeting that other participants can download and view.

- 1 In the conversation window, click the **Add or view Attachments** button to upload a file.



- 2 In the **Attachments** dialog box, click **Add Attachments**.
- 3 Select the file that you want to add, and then click **Upload**.

Conduct a poll

Polling allows you to quickly gather information or compile the preferences of meeting participants. A poll in Lync consists of one question and up to seven possible choices.

A meeting can contain many polls, but only one poll at a time can appear on the sharing stage, visible to all meeting participants. Only meeting presenters can create and manage polls. If you are not already a presenter, the meeting organizer or another presenter can make you one.

- 1 In the meeting window, click the **Share** menu, and then click **New Poll**.
- 2 In the **Create a Poll** dialog box, type a name for your poll, your question, and two or more possible answers.
- 3 Click **OK**.

If no one else in the meeting is sharing, your poll appears immediately to everyone in the meeting with the words **Polls are open** at the bottom of the stage. If other sharing is taking place, you have the option to share your poll immediately, which would end the current sharing session, or save your poll in the content bin for later.

When polling is complete, save the poll results by clicking **Save poll** at the bottom of the sharing stage, and then click **Close the poll**.

Answer a call

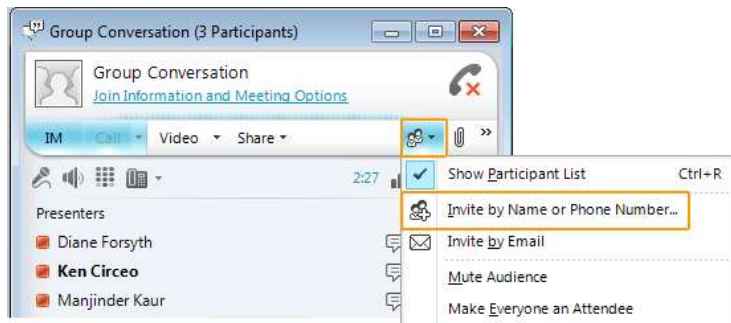
When a call alert appears on your screen, do one of the following:

- To answer the call, click the alert.
- To send the call to voice mail, click **Decline**.
- To redirect the call to a different number, click **Redirect**, and then select a number.



Invite other people to the conversation

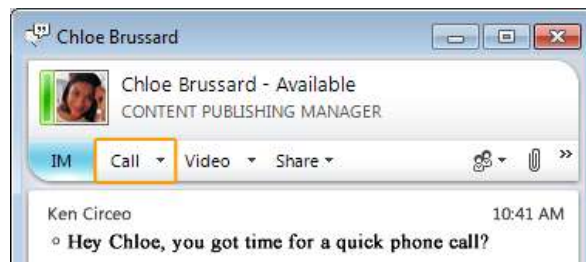
- 1 In the conversation window, click the **People Options** menu.
- 2 Click **Invite by Name or Phone Number**, click the contact you want or search for that person, and then click **OK**.



If someone is available only by phone, click **Invite by phone**, and then type the phone number. You can also drag contacts from your Contacts list into the conversation window.

Add voice to an IM conversation

You can add voice to an instant messaging (IM) conversation by just clicking the **Call** button. You can continue to type while talking.



Microsoft Lync 2010

Conferencing Quick Reference

Schedule an online meeting

You can schedule Microsoft® Lync™ 2010 meetings and conference calls from Microsoft® Outlook®. One meeting request is used for both purposes.

- 4 Open your Outlook Calendar.
- 5 On the **Home** tab, click **New Online Meeting** (in Microsoft Outlook 2010) or **Online Meeting** (in Microsoft Outlook 2007).



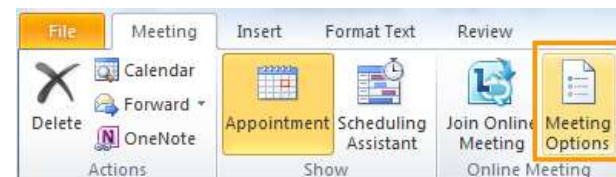
A new meeting request opens, to which you add recipients, a subject line, and other meeting details.

Set meeting options

The meeting request contains the dial-in information that the participant can use to join the audio part of the meeting or conference call. During the Lync meeting, dial-in information is available in the **Invite by Phone** dialog box (click the **People Options** menu, and then click **Invite by Phone**).

You can customize the dial-in information in the Outlook meeting request. You can also customize access and presenters.

- 1 In the meeting request, on the **Meeting** tab, click **Meeting Options**.

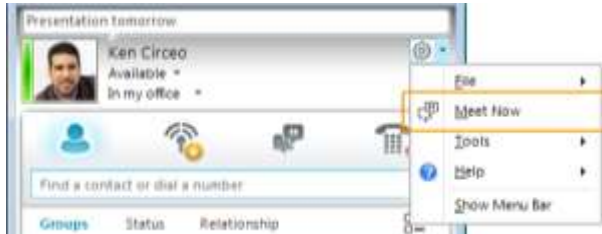


- 2 In the **Online Meeting Options** dialog box:
 - To control meeting access and presenter options, click **Access and Presenters**.
 - To customize dial-in information, click **Audio and Phone**.

Meet now

With the Meet Now option, you can quickly start a meeting or conference call with people inside or outside your organization.

- 1 In the Lync main window, click the arrow to the right of the **Options** button, and then click **Meet Now**.



- 2 In the conversation window, do any of the following:
 - To invite someone inside your organization, click the **People Options** menu, click **Invite by Name or Phone Number**, and then select a contact.
 - To invite someone outside your organization by email, click the **People Options** menu, and then click **Invite by Email**. An email message opens in Outlook. (If you do not have Outlook, copy the invitation text, and paste it into your email program.)
 - You can also add contacts to the meeting by dragging the contact from the Contacts list into the conversation window.

Join a scheduled online meeting

In the Outlook meeting request, click **Join online meeting** or click the meeting link.

Start time:	Fri 3/18/2011	12:00 PM
End time:	Fri 3/18/2011	1:00 PM

[Join online meeting](#)
<https://meet.contoso.com/meet/michele>

Join by Phone
+14255550185

[Find a local number](#)

Conference ID: 12345678

[Forgot your dial-in PIN?](#) | [First online meeting?](#)

Start a group IM conversation

You can start a group instant messaging (IM) conversation by selecting multiple contacts or a contact group from your Contacts list, or you can turn an IM conversation with one person into a group conversation.

To start a group conversation from the Contacts list:

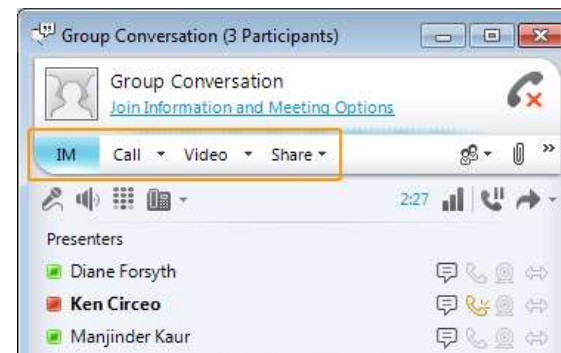
- 1 Hold down the Ctrl key, and click each contact that you want to invite.
- 2 Right-click the last contact, and then click **Send an Instant Message**.
- 3 Type your message in the message input area, and then press Enter.

To start a group conversation from a conversation window:

- Click the **People Options** menu, click **Invite by Name or Phone Number**, and then select the contacts that you want to invite.


Enhance your IM conversations

With Lync 2010, you can add communication modes to your IM conversation. For example, you can start an IM conversation with a single contact, add more contacts, and then add audio and video. If you need to share documents or slides, you can share your desktop.



To add voice or video, in the conversation window, do any of the following:

- To add voice, click **Call**.
- To add video, click **Video** to add video.

To invite others, in the conversation window, click the arrow to the right of **People Options** , and then select the contacts that you want to invite.

To share your desktop or a program, in the conversation window, click the **Share** menu, and then select your desktop, monitor, or a program to share.